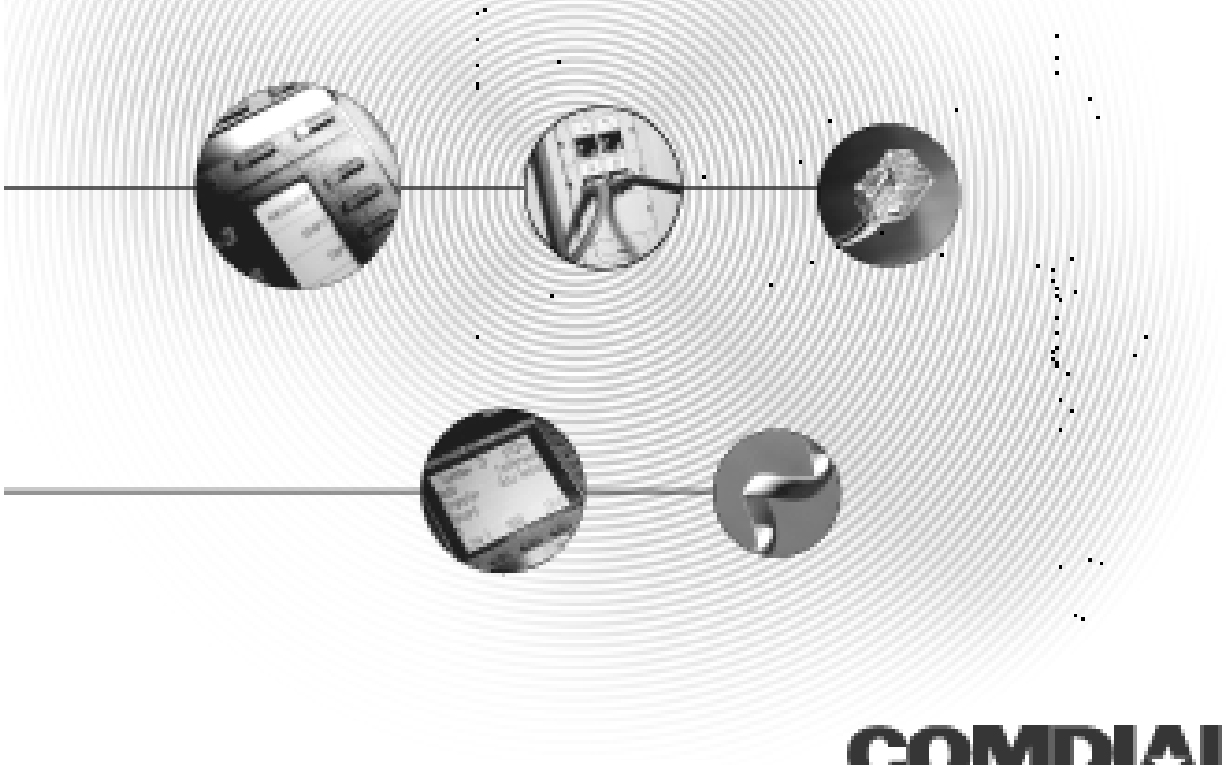
USER GUIDE

Corporate Call™ for Microsoft® Outlook®

User's Guide



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The Rising Star

GCA70–363.02 05/00
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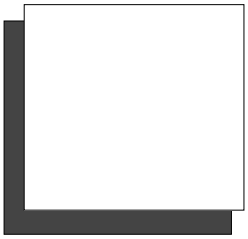


Contents

1 Introducing Corporate Call 1

Describing Corporate Call 1

Describing Corporate Call Telephone Directories 3

Registering Corporate Call 4

Detailing the Configuration Options 5

Options 6

Screen Pop Options 8

Pager Options 10

Call History 12

2 Using Corporate Call 13

Opening Corporate Call 13

Using the Keyboard with Corporate Call 14

Using the CallBar 15

Using On-Line Help 16

Providing Feedback 16

Answering Calls 16

Conferencing Calls 17

Controlling Do Not Disturb 18

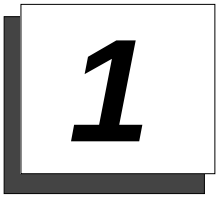
Forwarding Calls 18

Hanging Up a Call 19
Holding a Call 19
Retrieving Held Calls. 19
Identifying Callers 20
Making Calls 21
Dialing on an Existing Call. 21
Parking Calls 22
Setting Your Telephone's Volume 22
Tagging Calls. 23
Tracking a User. 24
Viewing Tracker Messages. 24
Transferring Calls 25
Transferring to Voice Mail 26
Checking Your Voice Mail. 26
Viewing Call History. 27

Appendix—Installing Corporate Call 29

Requirements 29
Connecting the Equipment 30
Client-Server Installation 32
Stand-Alone Installation 32
Installing the Corporate Call Software 32
Locating Related Publications 34

Index. 35



Introducing Corporate Call

This guide was developed based on the use of Corporate Call with a Comdial digital communications system. Use of Corporate Call with another manufacturer's TAPI-compliant system may cause the information in this guide to be inconsistent with your experience.

Describing Corporate Call

Corporate Call is a software program that serves as an extension to Microsoft® Outlook. It becomes part of the email/scheduler/calendar program and adds call control to a desktop PC that interfaces with a digital communications system.

Corporate Call runs on Microsoft® Windows 95, 98, 2000, and Windows NT 4.0. It is a 32-bit application designed to take advantage of newer operating systems.

Corporate Call is a Telephony Application Programming Interface (TAPI) application. It uses Impact Integrator to connect to Comdial's DXP, DXP Plus, FXT, and FXS digital communications systems. Corporate Call version 2A requires active seats of Impact Integrator. Corporate Call for Microsoft Outlook can be used with a variety of manufacturer's TAPI-compliant digital communications systems. Call Comdial for a complete list of approved systems and supported features.

Some of the features Corporate Call provides include the following:

- provides screen pops using information from the Outlook Contacts and MS Exchange server address books. Corporate Call also supports local .myd files and, if there is no contact information available, it shows caller ID information (Caller ID or ANI is required for external caller information),
- pages users by integrating the Comdial *QuikTrak* pager system, an external paging service, or message-ready cell phone service with the Outlook calendar and mailbox,
- has a separate floating CallBar to access telephone functions,
- allows dialing from the PC keyboard while on a call,
- provides easy access to communications system features, such as park orbits,

- stores call history records in an Outlook folder allowing call review, call backs, and report printing,
- supports drag and drop calling from web pages, e-mails, and most Windows applications.

Corporate Call runs on a standard personal computer (PC) that meets the following software and hardware parameters:

- Microsoft® Windows 95/98/2000/NT 4.0,
- Microsoft Outlook 98 or Outlook 2000,
- Microsoft Exchange,
- 16 meg of RAM (32 meg for Windows NT),
- VGA monitor (SVGA preferred),
- 5 megabytes of hard disk space,
- network interface.

If you are using Impact Integrator, Corporate Call uses Comdial's ***wideopen.office*** either over the network or on the same PC.

NOTE: If you are going to use Corporate Call with iNTerchange™, Comdial's unified messaging product, install iNTerchange Client 1.1 or later on the PC.

Describing Corporate Call Telephone Directories

Corporate Call reads its directory information from three sources:

1. The directory stored in the phone system.
2. The Primary Contacts folders you have stored within Microsoft Outlook.
3. The Global Address List kept by the Microsoft Exchange server.

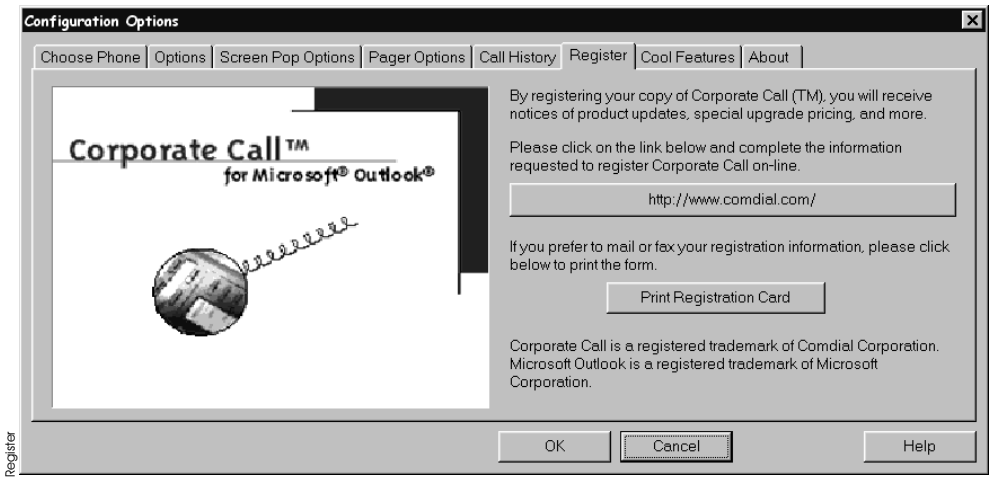
In the Dial, Transfer, and Conference dialogs, Corporate Call adds a new tab for each address book and contact folder. The program uses these directories for dialing other parties; identifying incoming calls that have caller ID, doing screen pops, and keeping records in the Call History log.

NOTE: If you have more than one Contacts folder in Outlook, the primary one is in the same location as your mailbox where new mail arrives. (If your Inbox is under Personal Folders, the Primary Contacts are also under Personal Folders.)

Registering Corporate Call

The Registration Dialog has two buttons. Clicking the **http://www.comdial.com/** button will take you to Comdial's website, where you can register Corporate Call. Clicking the **Print Registration Form** button prints a registration form that you can fill out and mail or fax to Comdial. Choose whichever registration method is most convenient for you.

Registration of Corporate Call is required to receive product updates, special promotional pricing, and service upgrades as soon as they are available.

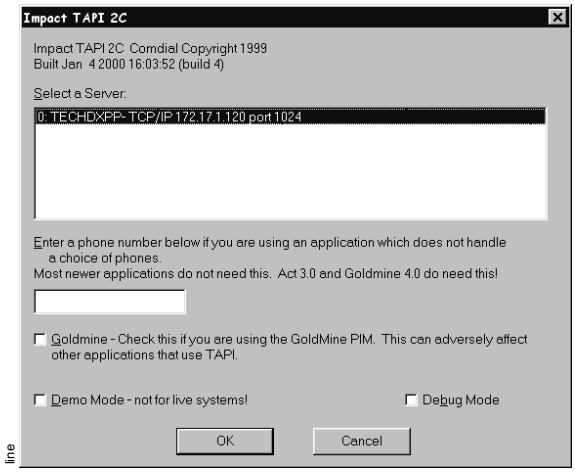

Configuration Options
Choose Phone
Options
Screen Pop Options
Pager Options
Call History
Register
Cool Features
About
Corporate Call™
for Microsoft® Outlook®
By registering your copy of Corporate Call (TM), you will receive notices of product updates, special upgrade pricing, and more.
Please click on the link below and complete the information requested to register Corporate Call on-line.
http://www.comdial.com/
If you prefer to mail or fax your registration information, please click below to print the form.
Print Registration Card
Corporate Call is a registered trademark of Comdial Corporation. Microsoft Outlook is a registered trademark of Microsoft Corporation.
OK
Cancel
Help
Register

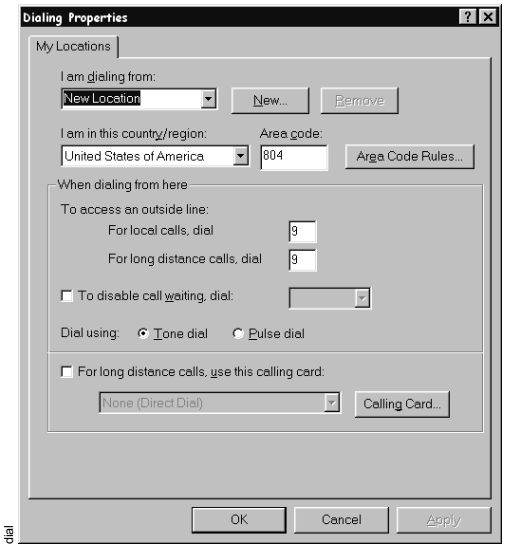
Detailing the Configuration Options

You can configure Corporate Call to meet the needs of each user. The following pages illustrate and describe the options available to each user.

Choose Phone

The Choose Phone option allows you to choose the telephone extension that Corporate Call will use—this is usually your extension. The Dial and Line Properties buttons let you configure the Windows telephony drivers.

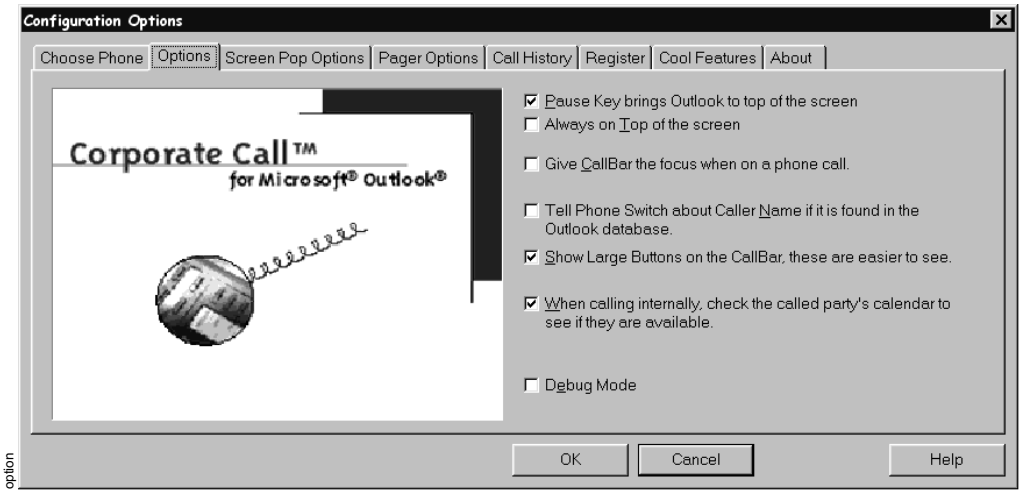

Impact TAPI 2C
Impact TAPI 2C Comdial Copyright 1999
Built Jan 4 2000 16:03:52 (build 4)
Select a Server:
0: TECHDXPP- TCP/IP 172.17.1.120 port 1024
Enter a phone number below if you are using an application which does not handle a choice of phones.
Most newer applications do not need this. Act 3.0 and Goldmine 4.0 do need this!
Goldmine - Check this if you are using the GoldMine PIM. This can adversely affect other applications that use TAPI.
Demo Mode - not for live systems!
Debug Mode
OK
Cancel
line



Options

The Options tab lets you customize the Corporate Call parameters.

Option	Description
Pause key restores or hides Outlook	The pause key brings Outlook to the top of the screen or hides it if it is already on the desktop.
Always on Top of the screen	This option keeps the CallBar visible at all times.
Show CallBar when on a phone call	With this option, you can have the CallBar appear when you are on a call. You can hide it when not on a call.
Tell Phone Switch about Caller Name	This option is for sites that have caller ID service. The program searches for the name of the caller using caller ID and sends the name to the communications system. If you transfer the call to someone else, the name appears on the telephone display of whoever gets the call. You can also use this parameter for call accounting purposes.
Show Large Buttons on the CallBar	If you wish to see large buttons with descriptions on the CallBar, select this option.
When calling internally, check the called party's calendar	If you check this option, Corporate Call consults the called party's Outlook calendar for his or her activity information. The caption on the CallBar tells you their status.
Debug Mode	The debug mode helps determine the source of problems in a system. Since the software runs slower when this is on, keep the debug mode turned off during normal operation.

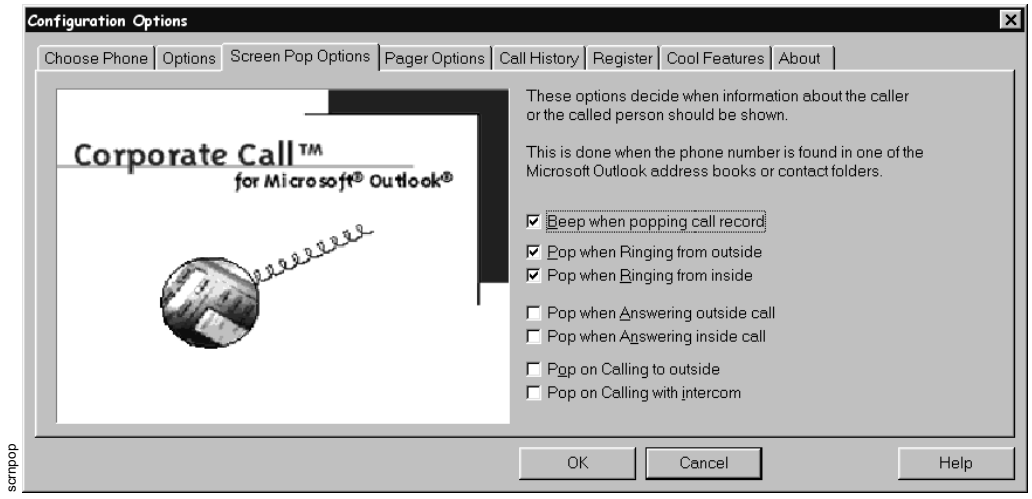

Configuration Options
Choose Phone
Options
Screen Pop Options
Pager Options
Call History
Register
Cool Features
About
Corporate Call™
for Microsoft® Outlook®
Pause Key brings Outlook to top of the screen
Always on Top of the screen
Give CallBar the focus when on a phone call.
Tell Phone Switch about Caller Name if it is found in the Outlook database.
Show Large Buttons on the CallBar, these are easier to see.
When calling internally, check the called party's calendar to see if they are available.
Debug Mode
OK
Cancel
Help
option

Options Tab

Screen Pop Options

This dialog lets you configure how you wish the screen pops to perform.

Option	Description
Beep when popping a call record	This option causes an audible beep to sound to indicate a call has caused a dialog to appear on the desktop.
Pop when Ringing from outside Pop when Ringing from Inside	This option causes screen pops to occur during outside ringing and inside ringing. If a call is ringing from the outside and the caller ID is available and there is a record in Outlook for the caller, the option displays a dialog to show the caller's identity.
Pop on Answering outside call Pop on Answering inside call	This option causes screen pops to occur when you answer either an outside call or an inside call. If you answer a call and there is a record in Outlook for the caller, the option displays a dialog to identify the caller.
Pop on Calling to outside Pop on Calling with intercom	This option causes screen pops to occur when you call outside or when you call inside. If you call someone and there is a record in Outlook for the caller, the option displays a dialog to show who you called.

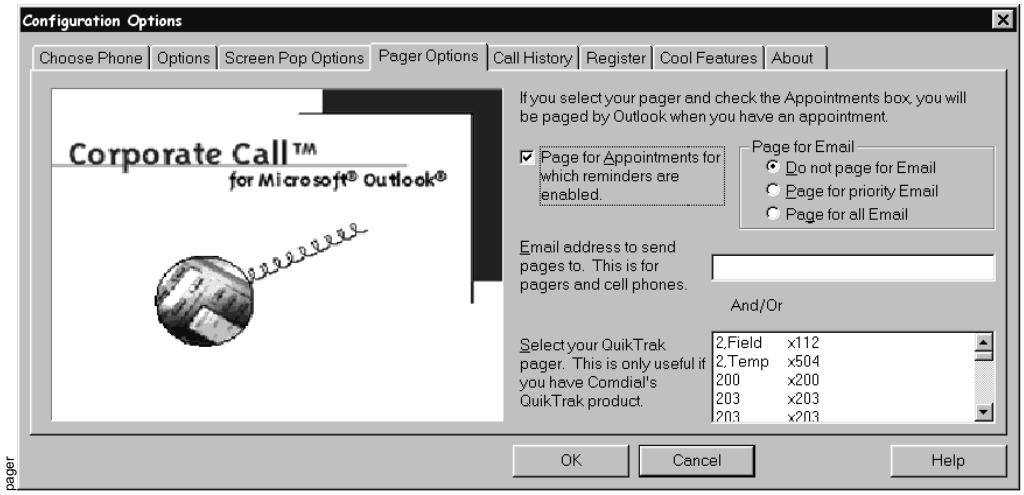

Configuration Options
Choose Phone
Options
Screen Pop Options
Pager Options
Call History
Register
Cool Features
About
Corporate Call™
for Microsoft® Outlook®
These options decide when information about the caller or the called person should be shown.
This is done when the phone number is found in one of the Microsoft Outlook address books or contact folders.
Beep when popping call record
Pop when Ringing from outside
Pop when Ringing from inside
Pop when Answering outside call
Pop when Answering inside call
Pop on Calling to outside
Pop on Calling with intercom
OK
Cancel
Help
scnpop

Screen Pop Options Tab

Pager Options

This tab lets you configure Corporate Call to integrate with a paging system such as Comdial's Tracker Pager system, an external paging service, or message-ready cellular phone service. There are several parameter choices that you can make to customize Corporate Call's paging operation.

Option	Description
Page for Appointments	To have appointment reminders in Outlook forwarded to your pager or cell phone, select this check box.
Do not page for Email	This selection disables e-mail paging.
Page for priority Email	This selection sends pages when Outlook receives urgent email that remains unread for 10 minutes.
Page for all Email	This selection sends pages when Outlook receives e-mail that remains unread for 10 minutes.
Email to pagers and cell phones	This selection lets you enter the e-mail address of your cell phone or your pager so that Corporate Call can send pages, such as e-mail or reminder notices, to those devices through your subscriber service.
Select your QuikTrak Pager	This menu shows the list of pagers configured in the Comdial QuikTrak Tracker Pager system. These pagers can be both local and wide area models. Select your pager from this menu if you wish.



Pager Options Tab

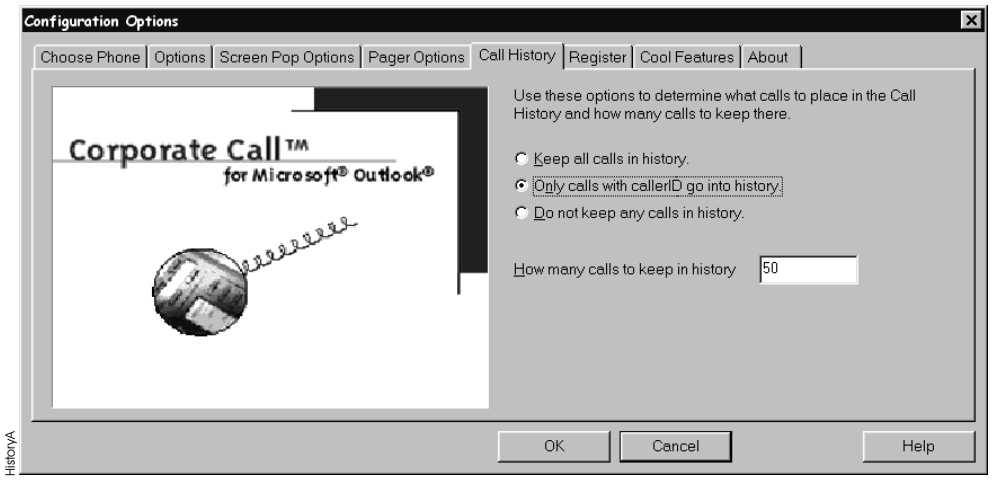
Call History

From the Call History dialog, you can determine the type and quantity of calls that you wish Corporate Call to place in your call history log. Corporate Call stores call history in your Outlook Call History folder. You can also access call history by clicking on the CallBar's **History** button.

The parameter choices that you make in this dialog include:

- **Keep all calls**,
- **Keep just those calls that have caller ID attached to them**,
- **Keep no calls at all**.

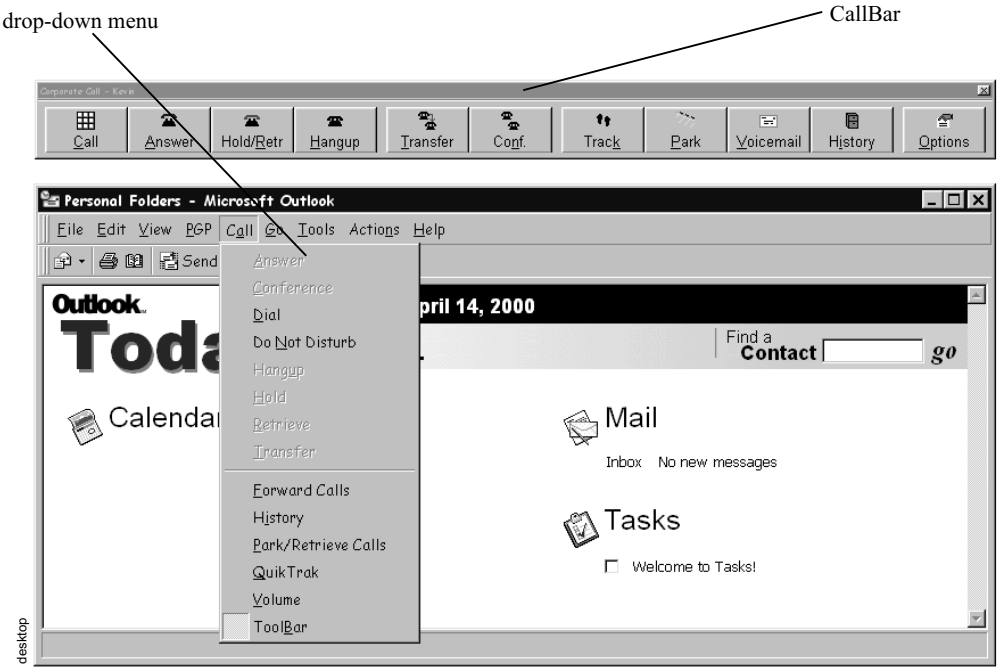
Once you make your choices, click **OK** to store them.



2 Using Corporate Call

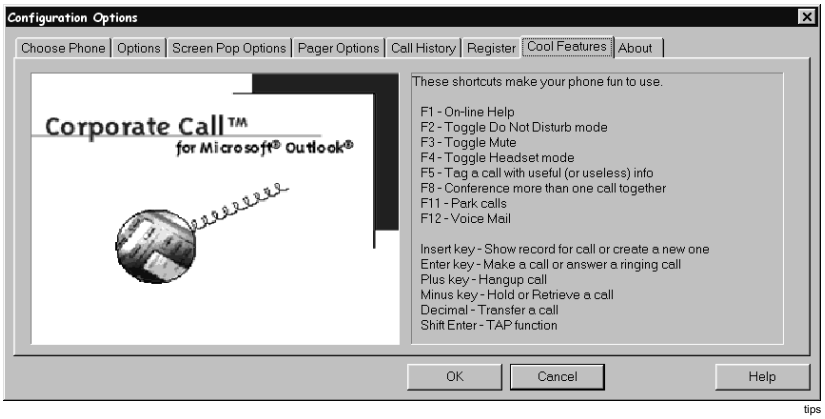
Opening Corporate Call

Using Corporate Call requires that you merely click the appropriate button on the Call drop-down menu in Microsoft Outlook, click the appropriate CallBar button, or press the appropriate key on your PC's keyboard.



Using the Keyboard with Corporate Call

Certain keyboard functions add flexibility to Corporate Call. The following illustrations detail those keyboard functions.


Configuration Options
Choose Phone
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Pager Options
Call History
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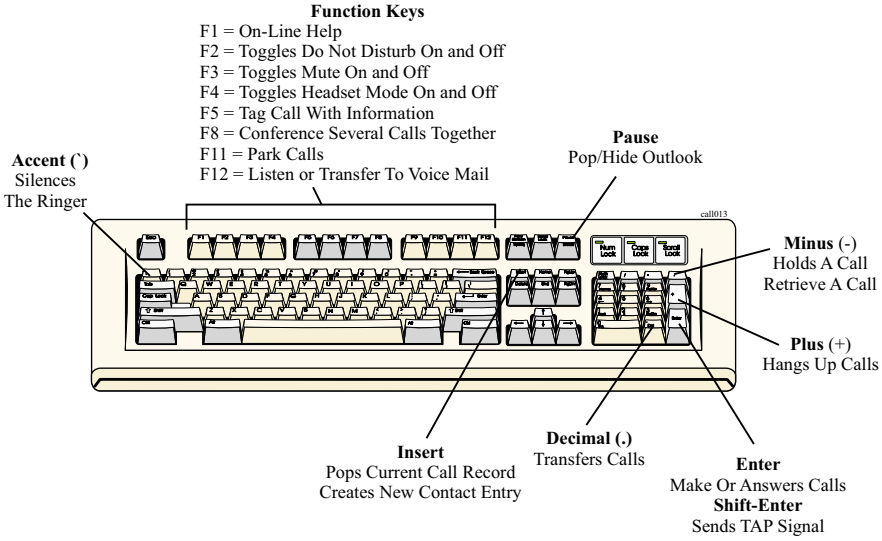
Cool Features
About
Corporate Call™
for Microsoft® Outlook®
These shortcuts make your phone fun to use.
F1 - On-line Help
F2 - Toggle Do Not Disturb mode
F3 - Toggle Mute
F4 - Toggle Headset mode
F5 - Tag a call with useful (or useless) info
F8 - Conference more than one call together
F11 - Park calls
F12 - Voice Mail
Insert key - Show record for call or create a new one
Enter key - Make a call or answer a ringing call
Plus key - Hangup call
Minus key - Hold or Retrieve a call
Decimal - Transfer a call
Shift Enter - TAP function
OK
Cancel
Help
tips



Using the CallBar

Corporate Call places a CallBar on your desktop whenever Microsoft Outlook is running on your PC. You can use the CallBar to access Corporate Call functions.

NOTE: If you hold your mouse cursor over a button, a tip that describes that button's function appears on the screen.

The CallBar can appear with large buttons or small buttons—you make this choice from the Options dialog.

Call This button presents a dialog from which you can place a call.

Answer This button answers your ringing telephone.

Hold/Retrieve This button places calls on hold and retrieves held calls.

Hangup Hang up your active call with this button.

Transfer Use this button to transfer a call using the presented dialog.

Conf. Use this button to Conference a call using the presented dialog.

Track Tracks a distant party using the Comdial Tracker Pager system (if available).

Park You can park an active call or retrieve parked calls with this button.

Voice Mail If you are not on a call, clicking this button automatically drops you into your voice mail box when you have voice mail messages. When you are on a call, clicking this button presents a dialog that allows you to transfer the call directly to a voice mail box.

History Obtain a dialog detailing your call history with this button.

Options This button presents a dialog from which you can change Corporate Call's operating parameters. Also allows you to access the on-line help file.

Using On-Line Help

To access the on-line help file, click the **Options** button on the CallBar.

Providing Feedback

If you wish to provide Comdial with feedback or feature requests, please send e-mail to: CoporateCall@Comdial.com.

This mailbox is checked weekly and is **only for user feedback, not technical assistance or problem solving.** Technical assistance is available from Comdial's Technical Support department.

Answering Calls

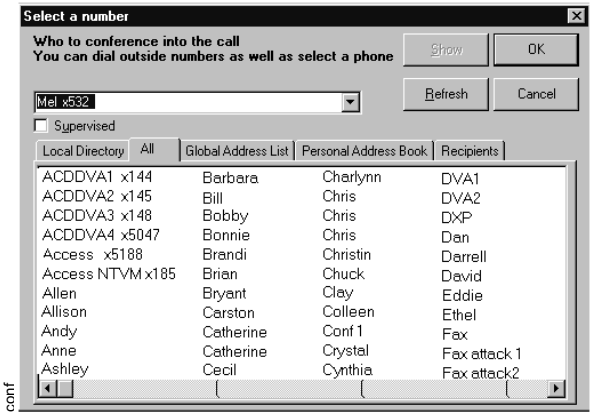
To answer a ringing call at your telephone, do any one of the following:

- Press the **Answer** button on the CallBar.
- Click **Answer** on the Call drop-down menu.
- If the CallBar is on top of the desktop, press **Alt-A** on the keyboard.
- If the CallBar is on top of the desktop, press **Enter**.

NOTE: Corporate Call can be configured to come to come to the top of the desktop screen on inbound or outbound calls by selecting the configuration option "Give CallBar the focus when on a phone call."

Conferencing Calls

You can establish both supervised and unsupervised conference calls with Corporate Call. By using the Conference dialog, you can select numbers from the overall list, different groups, or a personal directory. The software even keeps a list of recent numbers in the combo-box for redialing. The maximum number of conference calls supported by Corporate Call is four. If you require more than four, and your digital communications system supports more, you can add the additional parties using your telephone set.



To create a conference with an active call, do one of the following:

- Choose the **Conf.** button on the CallBar.
- Click **Conference** on the Call drop-down menu.
- Press **F8** on the keyboard.

  —OR—
- Press **Alt-N** on the keyboard.

To hang up a conference call, do one of the following:

- Choose the **Hangup** button on the CallBar and select the party you wish to drop, or choose to drop the entire call.
- Click Hangup on the Call drop-down menu and select the party you wish to drop, or choose to drop the entire call.

  —OR—

  Press the + key or **Alt + H** on the keyboard and select the party you wish to drop, or choose to drop the entire call.

Controlling Do Not Disturb

You can use Corporate Call to turn on and off the Do Not Disturb condition at your telephone. Do so in the following manner:

- Click **Do Not Disturb** on the Call drop-down menu.

  —OR—

- When the CallBar is active, press **F2** on the keyboard.

Forwarding Calls

Corporate Call provides several call forwarding features:

Always Forward

Allows call forwarding for every call that the system routes to your station.

Forward, Ring No Answer

Allows call forwarding for just the calls that ring at your station and receive no answer.

No Forwarding

Disables call forwarding. This is the default setting. You can enable a call forwarding parameter for your station as you wish.

To set call forwarding,

1. Click **Forward** on the Call drop-down menu.
2. When the Call Forward dialog appears on the screen, choose the type of forwarding that you desire and click **OK**.

Hanging Up a Call

To hang up an active call,

- Choose the **Hangup** button on the CallBar.
- Click **Hangup** on the Call drop-down menu.
  —OR—
- Press the + key on the keyboard.

Holding a Call

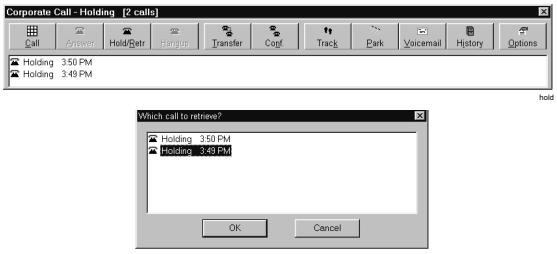
To place an active call on hold, do either of the following:

- Choose the **Hold/Retrieve** button on the CallBar.
  —OR—
- Click **Hold** on the Call drop-down menu.

NOTE: If you are on a call, and then make another call, Corporate Call will automatically put your original call on hold.

Retrieving Held Calls

To retrieve a held call,



1. Choose the **Hold/Retrieve** button on the CallBar.
   —OR—
   Click **Retrieve** on the Call drop-down menu.
   —OR—
   Press the - key on the keyboard.
   —OR—
   Press **Alt-R.**
2. Select the call that you wish to retrieve from this list that pops up (selection is necessary only if there is more than one call on hold) and click **OK**.

Identifying Callers

Corporate Call supports caller identification when the central office provides the caller ID and caller name (this can be number-only or name and number), and under the following circumstances:

- if the system knows the caller ID number from a database,
- if Corporate Call finds the caller ID number in an Outlook Address Book or in the default Contacts list.

Corporate Call can be configured in the Options menu to store call history. The software keeps caller information in the Call History list for later printing or reviewing. Caller identification is passed along automatically.

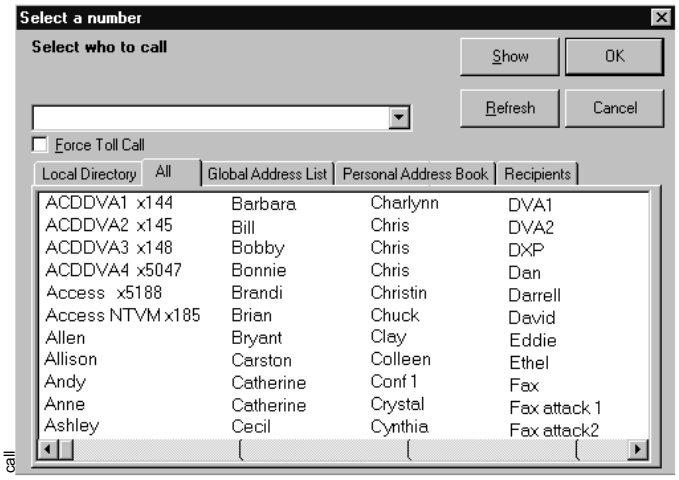
Making Calls

With Corporate Call, you can place a call by typing the contact's name, e-mail address, company name, phone number, or extension number (for internal calls).

By using the dialing dialog, you can select numbers from the overall list, different groups, or a personal directory. The software keeps a list of recent numbers in the combo-box for redialing.

To make a call, do any one of the following actions:

- Press the **Call** button on the CallBar.
- Click **Dial** on Outlook's Call drop-down menu.
- If the CallBar is on top of the desktop you may take either of the following actions:
  — press **Enter**,
  — press **Alt-C** on the keyboard.



Dialing on an Existing Call

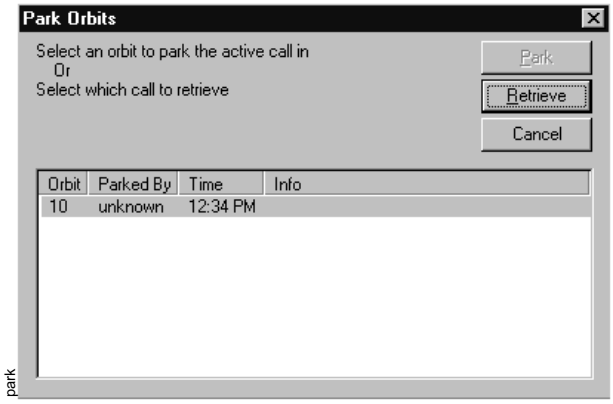
If, while you are on a call or are just off-hook, you start typing a number on your keyboard, Corporate Call dials that number. This feature is useful for responding to interactive voice responses (IVRs) and voice mail prompts.

Parking Calls

You can park any active call or pick up any calls left in park orbits. The dialog shows who is parked and who parked them. If you are parking an active call, the dialog selects the first empty park orbit to drop the call into. If you are not on an active call, the dialog selects the first call that you can retrieve. You can choose which park orbit to use if you wish.

To park a call, do one of the following:

- Select the **Park/Retrieve** button on the CallBar.
- Click **Park/Retrieve Calls** on Outlook's Call drop-down menu.
- Press **F11** on the keyboard.

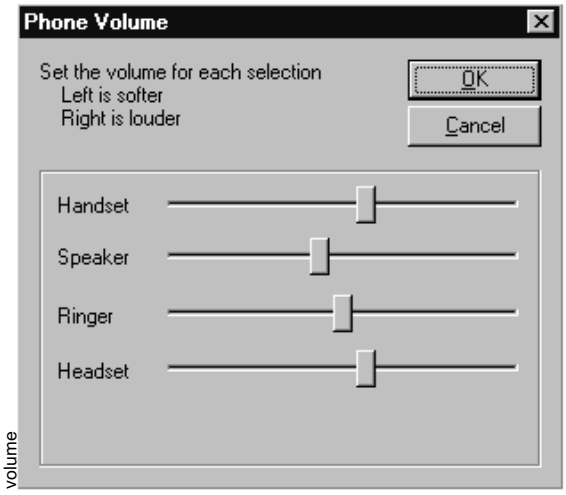


Setting Your Telephone's Volume

You can view and change the volume settings of your telephone by using the Volume Control dialog.

Set the telephone volume in the following manner:

- Click **Volume** on the Call drop-down menu, slide the bar on the pop-up dialog to the desired setting, and press **OK** to save the setting.

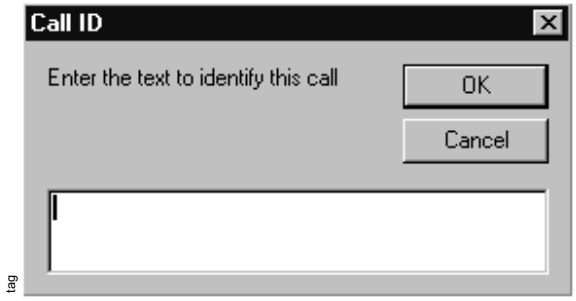


Tagging Calls

You can tag a call with a text identifier that Corporate Call displays whenever this call is viewable. This feature is used for identifying calls that the system returns as a result of a Transfer or Hold Recall. A call tag is stored in the Call History and is also visible with Comdial's Impact Attendant and Impact Group CTI applications.

To tag an active call, follow this procedure:

1. Press **F5** on the keyboard.
2. Type the tag message in the pop-up dialog.
3. Click **OK** to end.



tag

Tracking a User

You can track any party stored in the directory used by the Comdial QuikTrak pager system, and you can select more than one person to receive the same message.

To issue a tracking message, do one of the following:

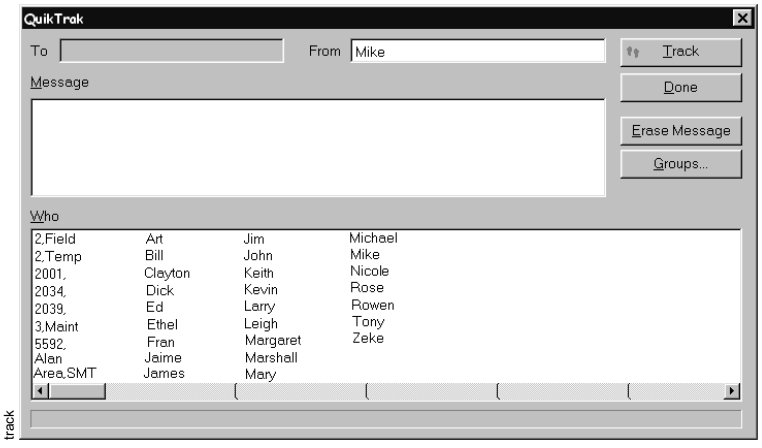
- Choose the **Track** button on the CallBar.
- Click **QuikTrak** on Outlook's Call drop-down menu.

  —OR—
- Press **Alt-K** when the CallBar is the active screen.

Viewing Tracker Messages

To see any track messages that users have sent to you, select the **Tracks Sent to You** tab entry on the **Call History** window. This is a useful feature if you have been out of tracker range.

NOTE: To view Tracker history, you must access Call History from the CallBar or Call menu. The Call History folder in Outlook only shows calls.



track

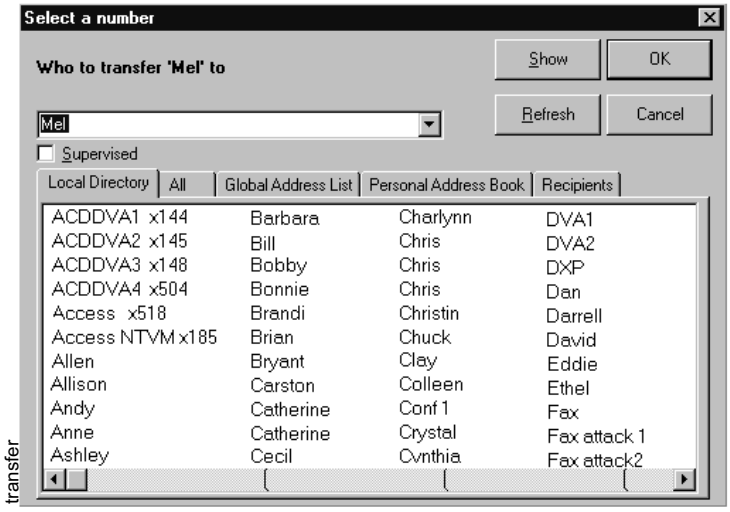
Transferring Calls

You can transfer active calls to other parties in the Outlook directories in both a supervised and unsupervised manner with Corporate Call. The transfer dialog lets you select numbers in the same manner as dialing a new call. Corporate Call keeps a list of recent numbers in the combo-box for redialing. Once you are in the dialog, you can select a name or start typing the name, e-mail address, or extension number. If you are typing the name, it will scan the list to find the closest match. Once it has the correct name, you can complete the transfer.

Transfer calls using any one of the following actions:

- Choose the **Transfer** button on the CallBar.
- Click **Transfer** on Outlook's Call drop-down menu.
- Press the ❑ key on the keyboard.
- Press **Alt-T** on the keyboard.

  —OR—
- Complete the transfer by either clicking the **Ok** button or pressing **Enter**.



transfer

Transferring to Voice Mail

With this Corporate Call feature, you can send a call into someone's voice mail box.

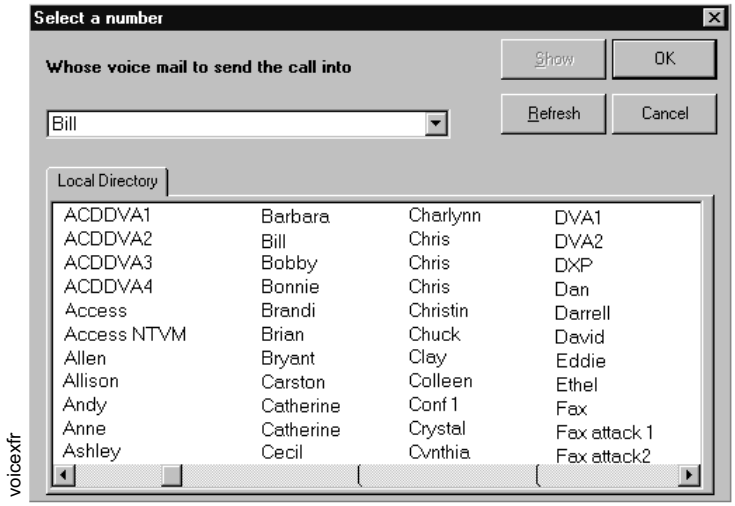
The transfer to voice mail the dialog lets you select numbers from the local directory. Corporate Call determines the voice mail box to which you will send the call. Corporate Call keeps a list of recent numbers in the combo-box for redialing.

To transfer a call to a voice mail box, take one of the following actions:

- Choose the **Voicemail** button on the CallBar.
- Press **F12** on the keyboard.
- Press **Alt-V** on the keyboard.

Checking Your Voice Mail

If you have voice mail messages waiting for your review, press the **Voicemail** button. Corporate Call drops you directly into your voicemail box as long as there is no active call.



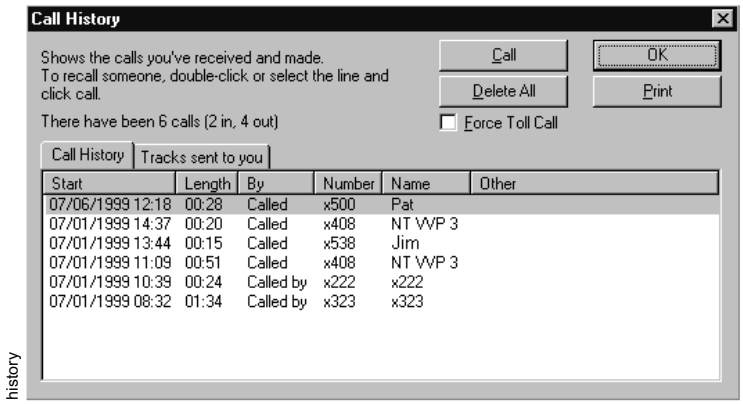
Viewing Call History

The Call History log shows a list of calls you have both made and received.

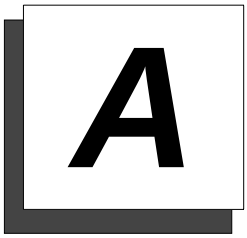
View your call history using either of the following actions:

- Choose the **History** button on the CallBar.
  —OR—
- Press **Alt-I** on the keyboard.

To return a call from the Call History dialog, simply double-click the entry. This feature is only accessible when viewing the call history from the CallBar or the Call drop-down menu in Outlook.


Call History
Shows the calls you've received and made.
To recall someone, double-click or select the line and click call.
There have been 6 calls (2 in, 4 out)
Call
Delete All
OK
Print
Force Toll Call
Call History
Tracks sent to you
Start
Length
By
Number
Name
Other
07/06/1999 12:18 00:28 Called x500 Pat
07/01/1999 14:37 00:20 Called x408 NT WP 3
07/01/1999 13:44 00:15 Called x538 Jim
07/01/1999 11:09 00:51 Called x408 NT WP 3
07/01/1999 10:39 00:24 Called by x222 x222
07/01/1999 08:32 01:34 Called by x323 x323
history

Notes



Installing Corporate Call

Requirements

Corporate Call runs on a standard personal computer that meets the following software and hardware parameters:

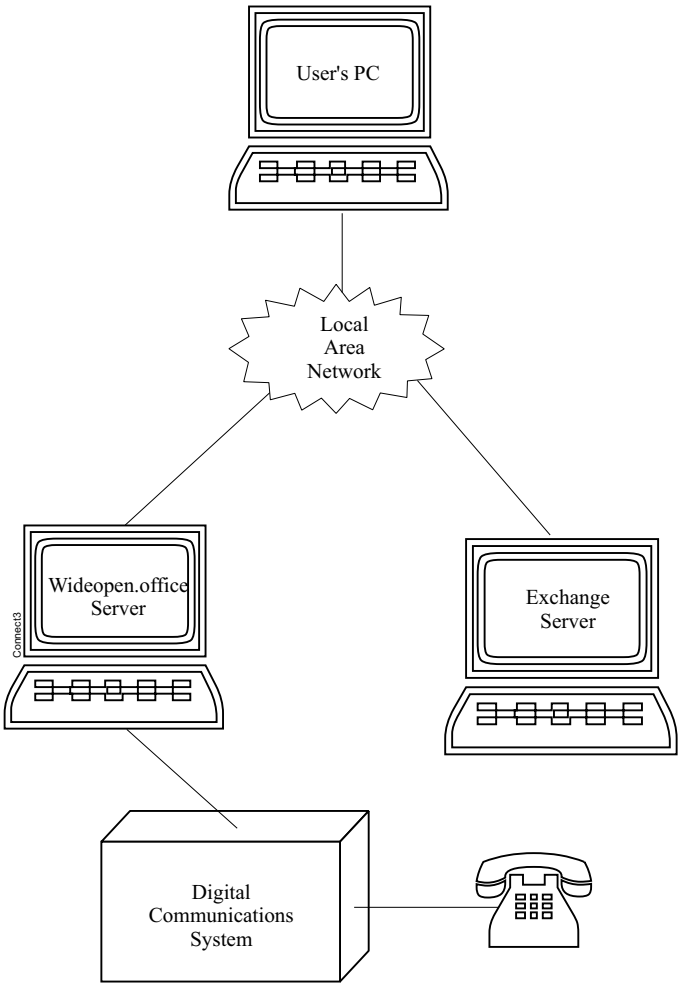
- Microsoft Windows 95/98/2000/NT 4.0,
- Microsoft Outlook 98 and Outlook 2000,
- Microsoft Exchange Server,
- 16 Meg of RAM (32 Meg for Windows NT),
- VGA monitor (SVGA preferred),
- 5 Mbytes of hard disk space,
- either a serial port or network interface,
- Corporate Call uses Comdial's ***wideopen.office*** either over the network or on the same PC.

NOTE: If you are going to use Corporate Call with iNTerchange, Comdial's unified messaging application, install iNTerchange Client 1.1 or later on the PC.

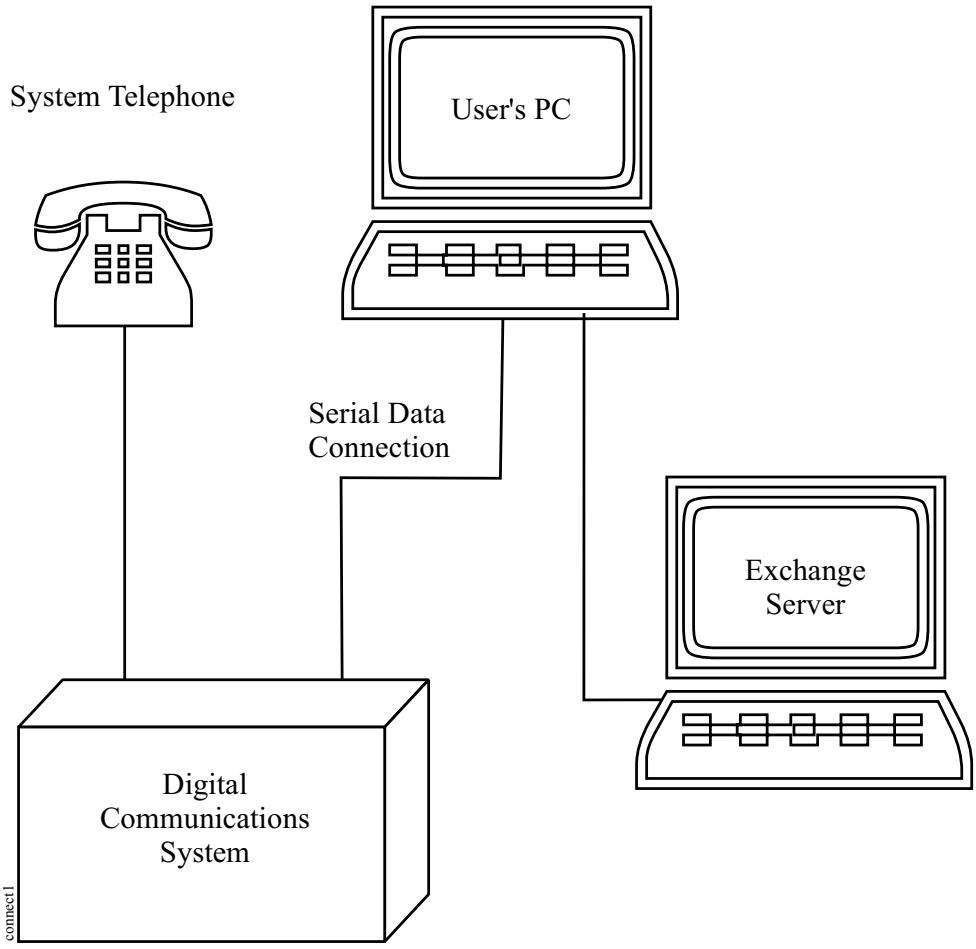
Connecting the Equipment

You can install Corporate Call as a network-based installation or as a stand-alone installation.

These installation schemes are illustrated below. Refer to the appropriate installation manual for connection details.



Corporate Call Network Installation



Corporate Call Stand-Alone Installation

Client-Server Installation

When installed as a client-server application, Corporate Call uses Comdial's *wideopen.office* telephony server software to provide its interface. IPX, TCP/IP, or NetBIOS protocol provides communication between the client PC and the *wideopen.office* server. The *wideopen.office* server is linked directly to the digital communications system.

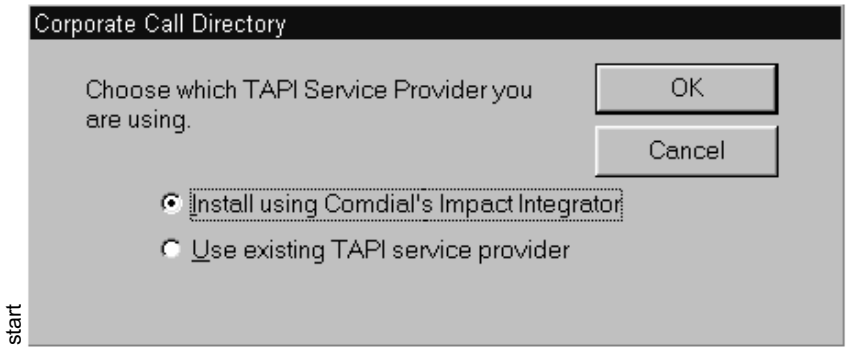
Stand-Alone Installation

When installed as a stand-alone installation, both the *wideopen.office* server and client software run on the same PC. That PC is linked directly to the digital communications system.

Corporate Call requires that Microsoft Outlook be running on a Microsoft Exchange server. Using Corporate Call without Microsoft Exchange will result in diminished functionality and potential technical difficulties.

Installing the Corporate Call Software

As a preliminary step, you must first install the *wideopen.office* software.



- If it is a stand-alone installation, install *wideopen.office* on the same PC as Corporate Call.
- If it is a network installation, install *wideopen.office* on the server PC, then use the same program disk to install *wideopen.office* on the client PC.

To install the *wideopen.office* software, refer to IMI89–235, *wideopen.office Installation Guide*.

After you have properly installed *wideopen.office*, install Corporate Call on the client PC. To do this, take the following steps:

1. Exit Microsoft Outlook.
2. Using Windows Explorer, navigate to the Corporate Call folder and double-click on the **setup.exe** icon. This starts the setup kit which loads the Corporate Call software, installs any needed operating system patches, and installs Impact Integrator.
3. A dialog appears prompting you to select the type of installation you want. (If you are using Corporate Call with a Comdial digital communications system, choose the Impact Integrator option.) Make your selection and click **OK**.
4. The first time you run Corporate Call, you will be prompted to register the product. This registration can be completed on-line if you have internet access or you can print, fill out, and mail or fax the registration form to Comdial. Please take the time to provide accurate information so we can better serve you and your future needs.
5. Upon completion of the registration process, the Corporate Call setup wizard will help you configure the software to your preferences. Once Corporate Call is loaded, it runs whenever you start Outlook.

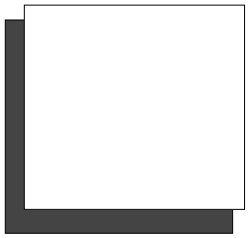
NOTE: Corporate Call may be part of a group of CTI applications that arrive at your site stored on a Compact Disk (CD). If that is the case, run Setup from the CD and select Corporate Call.

NOTE: Under Windows 95, Corporate Call may need to upgrade TAPI to version 2.1 and prompt you to restart Windows. After restarting, you will need to run the Corporate Call installation again to complete the process.

Locating Related Publications

When performing the installation of the Corporate Call hardware, you will need to refer to the related publications listed below:

- IMI66–105, *Installing The FXS Common Equipment Cabinet*
- IMI66–141, *Installing The FXT Common Equipment Cabinet*
- IMI66–134, *Installing The DXP Plus Main Common Equipment Cabinet*
- IMI66–001, *Installing The DXP Main Common Equipment Cabinet*
- IMI89–235, *Wideopen.office Installation Guide*
- GCA40–209, *Turning on Computer Telephony Interface Software*



Index

A

Answering Calls 16

C

Call Answering. 16
Call Conferencing. 17
Call Hangup 19
Call History 12, 27
Call Holding 19
Call Park 22
Call Tagging 23
Call Transfer. 25
Caller ID 20
Calling 21
Choose Phone 5
Client-Server Installation 32
Configuration Options 5
Connecting the Equipment 30
Controlling Do Not Disturb 18
Corporate Call Software, Installing . . 32

D

Describing the Telephone Directories . 3
Description 1, 2, 3, 4
Detailing the Configuration Options . . 5
Do Not Disturb 18

H

Holding a Call 19

I

Identifying Callers 20
Installation 32
Introduction 1

K

Keyboard, Using the. 14

M

Making Calls 21
Making the Connections. 30

N

Network Installation 30

O

Options 6

P

Parking Calls 22

Q

QuikTrak Configuration 10

R

Registering Corporate Call . 4, 5, 6, 7, 8, 9, 10, 11, 12
Related Publications 33

S

Screen Pop Options 8
Setting Your Telephone’s Audio Volume 22
Software, Installing 32
Stand-Alone Installation 31, 32

T

Tagging Calls 23
Tracking a User 24
Transferring Calls 25
Transferring to Voice Mail 26

U

Using the CallBar 15

V

Voice Mail Transfer 26
Volume Control 22

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GCA70–363.02 05/00
Printed in U.S.A.

Printed in U.S.A.
MKTBSUG Rev. 1

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